

<insert client logo>

***Health Engagement Program (HEP)
Implementation Guide***



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Purpose:

The Health Engagement Plan Implementation Guide is designed to assist organizations and benefit administrators through the pre-planning and implementation phases of incorporating a wellness incentive tracking system into their health and wellness programs.

It is intended to be used in conjunction with benefit consulting support, legal counsel review and billing/financial experts who can advise organizational leaders about how to best address the unique health incentive strategies of their respective organizations as well as the individuals and communities they serve.

The implementation guide includes an overview of the platform's major features, functionality and the necessary requirements to ensure optimal use of the incentive tracking system. The guide has been designed to allow users to navigate between the various sections easily.

Service integrity and recovery plan

In order to provide continuous improvement, ODS solicits continuous feedback from our clients so that we may bring you the best experience possible. Feedback can be directed to hepsupport@odscompanies.com.

In the unlikely event of a service disruption, ODS will respond with a recovery plan within one business day and will audit the integrity of the portal once it is operational again. Any questions or issues with the portal should be addressed via email to hepsupport@odscompanies.com. The support inbox is constantly monitored in order to provide the fastest possible response time.

Team

ODS Team - For the implementation and ongoing support of your HEP program the ODS team is as follows

| Name | Title/Role | Phone | Email |
|------|------------|-------|-------|
| | | | |
| | | | |
| | | | |

Client Team - Client implementation and ongoing support team

| Name | Title/Role | Phone | Email |
|------|------------|-------|-------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Eligibility

Eligibility Population – the eligibility requirements set the population’s accessibility to the HEP program.

| Population type | |
|---|--|
| Total population | |
| Total eligible population | |
| Employees | |
| Employees and spouses | |
| Employees, spouses, and dependents over 18 | |

Eligibility configuration – For rewards fulfillment the eligible population will need to have a unique ID that is transmitted within the eligibility file. This unique ID will be carried through the system and used to report to the client for processing and rewards fulfillment.

| Unique Identifier | Population |
|--------------------------|-------------------|
| | Employees |

Incentive program accessibility and delivery

HEP timeframe – The timeframe that the HEP program will be accessible to the eligible population. Please include any variations for specified populations, for example: new hires will have access to the system up until July 2013, with a completion date of Sept 30.

| Population type | Start Date | End Date | Incentive Delivery |
|-----------------|------------|----------|--------------------|
| | | | |
| | | | |

HEP Incentive:

Participate in a variety of activities. Participants will earn points at each step with a goal of earning XXX points between <Insert Date> and <Insert Date> to earn a reward.

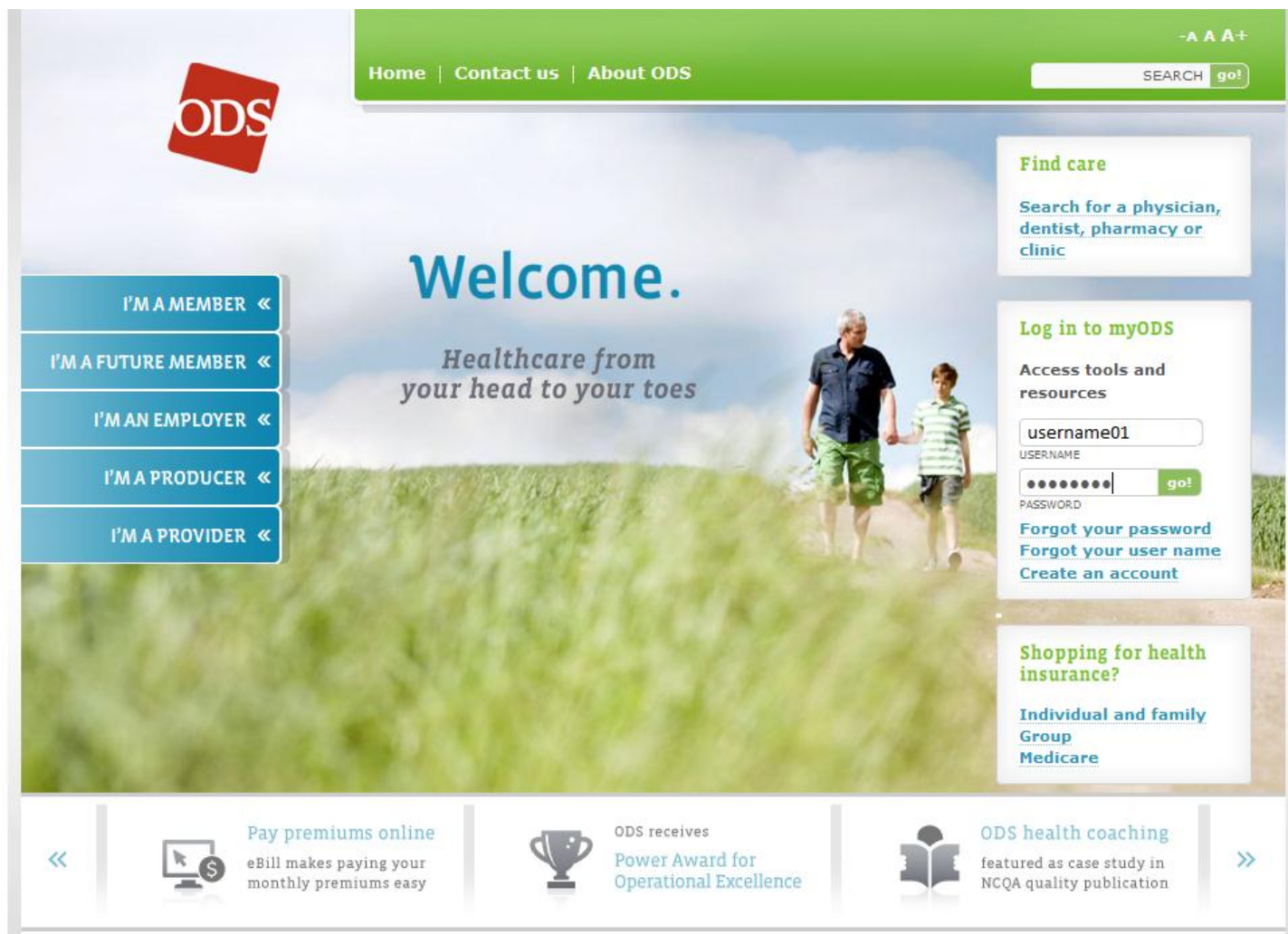
Incentive processing details:

The reward redemption file will be sent to <Client> on a <Frequency> basis via secured email. ODS will notify <Client> if any file delivery issues are encountered.

Program content

My ODS

Login to my ODS at www.odscompanies.com



To get to the incentive tracking section, the user will login to myODS, from <Location> within myODS there will be a link to the WorldDoc portal. The first time a user gets logged into WorldDoc through the SSO link within myODS, they will be directed to a registration page which will ask them to accept the privacy policy.

Immediately after accepting the privacy policy and on subsequent visits to the WorldDoc portal via myODS, users will land on the home page. Users will then click on the “earn points” link in the Events & Announcements section on the page to see their “today’s points” section.

The screenshot displays the WorldDoc Health Management System interface. At the top, the header includes the ODS logo, the text "WorldDoc Health Management System", and navigation links: "home", "feedback", "other resources", "preferences", and "favorites". A search bar and a "logout" link are also present. Below the header, a "welcome: ODSdemo ODSdemo" message is shown with a home icon. A left sidebar contains a list of navigation options: Home, Health & Symptom Evaluation, Medical Library, Health Helpers, Pharmacy, My Health Files, and News & Communications. The main content area features several tiles: "Health Risk Assessment" (with a "Get Started" button), "Health & Wellness Medical Library" (with an "Explore" button), "Health Symptom Checker" (with a "Use it" button), "Message Center" (with a "View Your Inbox" link and a message count of 1), and "Health eRewards". Below these tiles is the "Events & Announcements" section, which contains a graphic of a green tree and text encouraging users to "earn points" by engaging in healthy activities. A callout box is overlaid on this section, providing a larger view of the announcement and highlighting the "earn points" link. The footer of the page includes links for "Home", "Privacy Policy", "Disclaimer", and "Feedback", along with the copyright notice "© 1999-2012 WorldDoc Inc. All rights reserved." and the "POWERED BY WorldDoc" logo.

WorldDoc Health Management System

home • feedback • other resources • preferences • favorites

welcome: ODSdemo ODSdemo

Home

Health & Symptom Evaluation

Medical Library

Health Helpers

Pharmacy

My Health Files

News & Communications

Health Risk Assessment

Health & Wellness Medical Library

Health Symptom Checker

Message Center

View Your Inbox

You have 1 new messages.

Health eRewards

Events & Announcements

Health eRewards Engage in healthy activities to earn rewards! The more you do, the more points you earn. Start earning points today to improve your health and earn rewards.

[earn points](#)

Featured Tools & Services

Points and Rewards

Health Risk Assessment

Health News

- Study finds mismatch between kids and vitamins
- Extra weight comes with more knee pain, stiffness
- Early menopause tied to higher heart disease risk
- FDA OKs first obesity drug in 13 years
- Vaccinations cleared in babies' celiac 'epidemic'

[more](#)

Home | Privacy Policy | Disclaimer | Feedback

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POWERED BY WorldDoc

Clicking on the “earn points” link will direct the user to the “today’s points”

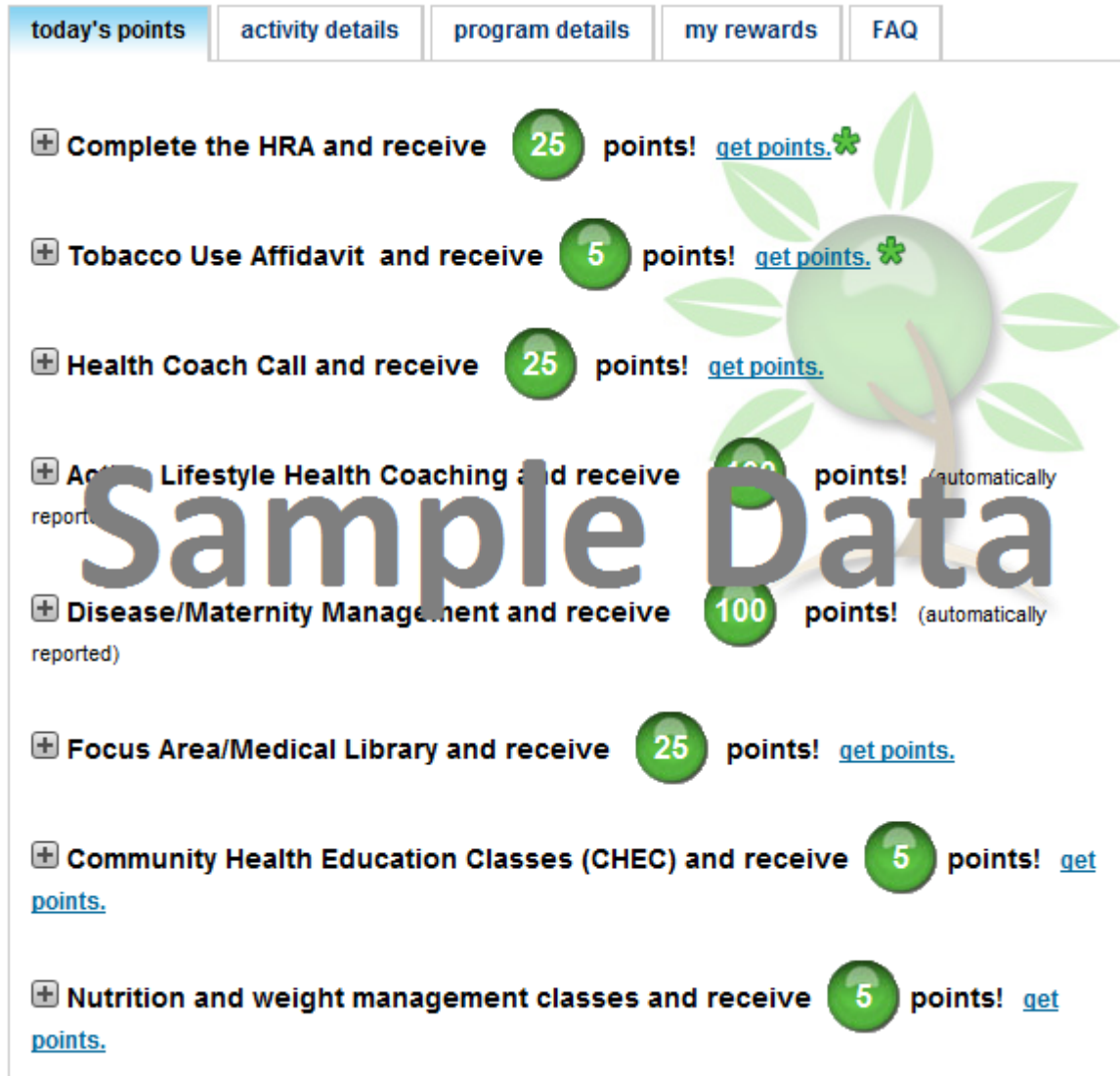
Incentive program activities

The program details are presented to the user within 5 tabs

- Today's points – displays current available points
- Activity details – displays all current points available in the program
- Program details – displays the program rules, such as who is eligible, etc.
- My rewards – displays fulfillment requirements, such as how to earn points and redeem rewards
- FAQ's – frequently asked questions about the program

Today's points

The “today's points” screen displays the unfulfilled rewards currently available to the participant. It will not display any fulfilled, future, or expired rewards.



The screenshot shows a web interface with a navigation bar at the top containing five tabs: 'today's points' (selected), 'activity details', 'program details', 'my rewards', and 'FAQ'. Below the tabs is a list of activities, each preceded by a plus icon in a square. Each activity is followed by a green circle containing a point value, the text 'points!', and a link to 'get points.' with a green asterisk icon. The activities and their point values are:

- Complete the HRA and receive 25 points! [get points.](#)*
- Tobacco Use Affidavit and receive 5 points! [get points.](#)*
- Health Coach Call and receive 25 points! [get points.](#)
- Active Lifestyle Health Coaching and receive 100 points! (automatically reported)
- Disease/Maternity Management and receive 100 points! (automatically reported)
- Focus Area/Medical Library and receive 25 points! [get points.](#)
- Community Health Education Classes (CHEC) and receive 5 points! [get points.](#)
- Nutrition and weight management classes and receive 5 points! [get points.](#)

A large, semi-transparent 'Sample Data' watermark is overlaid across the center of the screenshot.

Activity details

The activity details tab allows the user to see additional details about all activities, current and expired.

All available activities

| Evaluations and Assessments | |
|-----------------------------|--|
| Activity | Details of Landing Page |
| HRA | Complete your Health Risk Assessment. |
| PES | The Personal Evaluation System walks you through a 4-step process to learn more about pain or illnesses you may be experiencing. |
| Geriatric HRA | This risk assessment is intended for people 65 years or older. It will assess your overall health status and risk factors. |
| Diabetes | Use this assessment to determine how well you are managing your Diabetes. |
| CAD | Evaluate the steps you are taking to manage coronary artery disease. |
| CHF | This assessment will help you determine how well you are managing congestive heart failure. |
| My health files | |
| Activity | Details of Landing Page |
| My chart | Update and keep track of your personal and family medical history in one convenient location. |
| My medications | Get important alerts and reminders about the medications you are taking by managing your medicine cabinet online. My medications will auto populate through claims data. |
| Communications | |
| Activity | Details of Landing Page |
| Message center | Check your message center inbox for secure, personalized messages about your health. |
| Calculators | |
| Activity | Details of Landing Page |
| 10 year cardiac risk | This assessment is designed to help you determine and understand your risk for heart attacks and strokes in the future. |
| Adult preventive health | This tool is designed to provide you with preventive screening information to review based on your age and gender. |
| Alcohol dependence | This assessment is designed to help you determine and understand your risk for alcohol abuse. |
| BMI | This calculator is designed to help you determine and understand your body mass index (BMI) as it pertains to your overall health. The BMI is a measure of relative heaviness/obesity. |

| | |
|-------------------------------|---|
| Childhood immunizations | This assessment is designed to help you determine and understand your child's immunization status based on the child's age. |
| Depression | This assessment is designed to help you determine and understand your risk for Depression. |
| Fitness | This assessment is designed to help you determine and understand your fitness level. |
| Nicotine | This assessment is designed to help you understand your risk of nicotine dependence/addiction. |
| Pregnancy management | This calculator is designed to help you understand your pregnancy risk level. |
| Stress | This assessment is designed to help you determine and understand your stress level. |
| Substance abuse | This assessment is designed to help you determine and understand your risk of substance abuse. |
| Substance abuse kids | This assessment is designed to help you determine and understand your child's behavior and define whether they are at risk of substance abuse or have mood disorder. |
| Medical Library | |
| Activity | Details of Landing Page |
| Overview | Explore thousands of health articles to find detailed information on symptoms, conditions, wellness topics, tests, surgeries and more. |
| Focus areas | Read in-depth health guides on popular topics including weight loss, smoking cessation, exercise, nutrition, heart disease, diabetes and more. |
| Health tips | Browse through hundreds of quick and easy health tips to help you manage stress management, lose weight, get fit, eat right, control cholesterol, lower blood pressure and quit smoking. |
| Health Helpers | |
| Activity | Details of Landing Page |
| Calculators overview | View assessment tools that are intended to help you understand your potential risk of a condition based on the selected assessment. When you have completed an assessment, you will be provided with recommendations and appropriate information for you to review based on your calculated risk level. |
| Health trackers | Record important health numbers to chart progress toward your health goals. |
| Healthy Living Program | |
| Activity | Details of Landing Page |
| HLP enrollment | Join the Healthy Living Program (HLP). This online coaching program is a 12-week journey toward a healthier you. Set your health goals and choose activities to help you build better health habits week by week. |
| HLP progress update | Rate your Healthy Living Program (HLP) progress and choose your next goal. |
| HLP completion | Complete and review your healthy living goals. |

<Client> selected activities

today's points











activity details

program details



my rewards

FAQ

[Print summary](#)

| ▼ | ▼ | Activity Name | Chances Left | Start Date | End Date | Points/Chance | Maximum Points | Points Earned |
|---|---|--|--------------|------------|------------|---------------|----------------|---------------|
| |  | Take the Health Risk Assessment (HRA) | 1 | 10/01/2012 | 06/30/2013 | 350 | 350 | 0 |
| | | Use the calculator tool | 5 | 10/01/2012 | 06/30/2013 | 5 | 25 | 0 |
| | | Visit the Focus Areas in the medical library | 1 | 10/01/2012 | 06/30/2013 | 5 | 5 | 0 |
| |  | Attend a Lunch and Learn - Detoxify your workspace (ODS Tower - conference line for other locations) | 1 | 10/01/2012 | 06/30/2013 | 10 | 10 | 0 |
| |  | Attend a Lunch and Learn - Invest in your retirement (ODS Tower - conference line for other locations) | 1 | 10/01/2012 | 06/30/2013 | 10 | 10 | 0 |
| |  | Enroll in Weight Watchers and participate in a meeting | 1 | 10/01/2012 | 06/30/2013 | 10 | 10 | 0 |
| |  | Participate in a community event/race | 1 | 10/01/2012 | 06/30/2013 | 15 | 15 | 0 |
| |  | Biometrics screening | 1 | 10/01/2012 | 06/30/2013 | 25 | 25 | 0 |
| |  | Get a flu shot | 1 | 10/01/2012 | 06/30/2013 | 15 | 15 | 0 |
| |  | Healthy habits | 3 | 10/01/2012 | 06/30/2013 | 10 | 30 | 0 |
| |  | Tobacco-use affidavit | 1 | 10/01/2012 | 06/30/2013 | 15 | 15 | 0 |
| |  | Dress up for Halloween | 1 | 10/01/2012 | 06/30/2013 | 5 | 5 | 0 |

Activities with frequency greater than 1 can only be updated once per day

 - Mandatory Activity
  - Offline activity

Points Earned

0

Points Until Reward

400

Total Program Points

515

You must complete all mandatory activities to get a Reward

HEP activities

Define the program activities

- Online
- Self-reported
- Offline – requires a file upload
- Pledge based requiring an affidavit
- Claims based

Online Activities

Define the program activities

| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
|---|------------|----------|-------------|-------------|---------------|---------------|
| Health Risk Assessment (HRA) | | | | | | Y |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| Calculator tools | | | | | | |
| Description | | | | | | |
| View these assessments and screenings designed to help you determine and understand your health status and future risk in a variety of health related scenarios. | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| Focus areas/medical library | | | | | | |
| Description | | | | | | |
| Use the focus areas to quickly take you to information that interests you the most. Choose an area to find subject-specific content on how to evaluate and accomplish personal health goals. | | | | | | |

Self-reported activities

Define the program activities

| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
|--------------------|------------|----------|-------------|-------------|---------------|---------------|
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |

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| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
|---------------|------------|----------|-------------|------------|---------------|---------------|
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occrs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |

Claims based activities

Define the program activities

| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
|---------------|------------|----------|-------------|-------------|---------------|---------------|
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |
| Activity name | Start date | End date | Point value | No. occurs. | Point maximum | Mandatory Y/N |
| | | | | | | |
| Description | | | | | | |
| | | | | | | |

Program details

The program details tab displays the rewards program rules. The program rules describes who is eligible for the program and the length of the program. Any other considerations around program eligibility could be listed here.



today's points
activity details
program details
my rewards
FAQ

Program Rules:

Walk the Talk mission: To create a work environment and culture that promotes healthy lifestyles and enhances quality of life. Walk the Talk works to provide activities, resources, and partnerships to help maintain a healthy work-life balance.

Benefit eligible employees can participate in the Walk the Talk eRewards program and earn points between October 22, 2012 and November 30, 2012 to be entered into a raffle for some great prizes, including the grand prize of extra discretionary day off!

| | | |
|--|----------------------------|-----------------------------|
| Points Earned | Points Until Reward | Total Program Points |
| 0 | 400 | 515 |
| You must complete all mandatory activities to get a Reward | | |

Program details text

My rewards

my rewards tab displays the rewards fulfillment rules. Fulfillment rules describes what the user needs to do to earn the reward and what the reward is. Any other considerations around the redemption of the rewards could be listed here.



today's points activity details program details **my rewards** FAQ

Fulfillment Rules:
Earning Walk the Talk eRewards points is easy! Simply take part in a variety of online and self-reported health and wellness activities between Oct. 22, 2012 and Nov. 30, 2012 and you can earn enough points to win some great raffle prizes, including:

- A full extra discretionary day off (drawing between top point earners)
- Multiple \$75/\$50/\$25 gift cards and other great prizes
- A casual day on Monday, December 21st for all participants who achieve 450 points

For a full prize list, you need to earn at least 50 points.

How to earn points:

To earn points, you must complete the required online Health Risks Assessment (HRA) through myODS, along with other health activities from Oct. 22nd to Nov. 30th. As you complete the online activities and manually enter your self-reported activities into the system, your points will automatically be added to your point totals.


| Points Earned | Points Until Reward | Total Program Points |
|---------------|---------------------|----------------------|
| 0 | 400 | 515 |

You must complete all mandatory activities to get a Reward

My rewards text

FAQ

Displays the program specific FAQ's.



Walk the Talk

[today's points](#)
[activity details](#)
[program details](#)
[my rewards](#)
[FAQ](#)

FAQ :
What is Walk the talk?

Walk the Talk is our approach to long-term wellness: a program currently for benefit-eligible employees only. Walk the talk is designed to eliminate and/or reduce as many employee health risks as possible. our goal is to create a culture of health at ODS. We hope that this wellness culture goes beyond our doors and permeates our communities.

Do I have to participate in Walk the Talk?

Walk the Talk is an opportunity to do something great for yourself. Whether or not you take this opportunity is completely up to you. If you decide to participate, count on resources. ODS provides the tools you need to be a part of Walk the Talk and offers valuable rewards for participating. Full participation in Walk the Talk will not only encourage your healthy living, but will help you maintain a healthy work/life balance.

What are the rewards of participating in Walk the Talk?

When you participate in Walk the Talk, you will be entered into a raffle. The grand prize is a full extra discretionary day off! There will also be additional drawings for three \$75 American Express gift cards, three \$50 gift cards (Fred Meyers, Gasoline, Amazon.com), three \$25 gift cards to Regal Cinemas, and ten \$5 Starbucks gift cards. Everyone who reaches enough points to be entered into the drawing will automatically win a casual day on December 21st.

For more information click here [< Insert link to PDF of all FAQ's >](#)

| Points Earned | Points Until Reward | Total Program Points |
|--|---------------------|----------------------|
| 0 | 400 | 515 |
| You must complete all mandatory activities to get a Reward | | |

Client specific FAQs

Q:

A:

Q:

A:

Q:

A:

Q:

A:

Appendix A:

| <u>Calendar event</u> | <u>Dates</u> | <u>Responsible Party</u> |
|--|---------------------|---------------------------------|
| Build out of HEP Program/Benefit configuration | | ODS |
| <u><Month></u> | | |
| Communication plan build | | ODS |
| - Integration with Salem Health's current wellness activities | | |
| - OE communication | | |
| - Selection of targeted campaigns | | |
| - <Year> communication calendar | | |
| Open enrollment messaging | | ODS/Client |
| Demo of incentive portal | | ODS |
| Refined incentive portal demo based on feedback (if necessary) | | ODS |
| <u><Month></u> | | |
| Employee communications | | Client |
| - Promotion of HEP to employees including activity list | | |
| - HEP FAQ's | | |
| - Program rules | | |
| - Employee rights and responsibilities | | |
| User acceptance testing (UAT) | | Client |
| <u><Month></u> | | |
| Approval/sign off from Client | | Client |
| <u><Month></u> | | |
| Portal launch/go live | | ODS |
| Review of launch | | ODS/Client |
| Promotion of launch to population | | Client |
| Launch any internal campaigns (if necessary) | | Client |
| <u><Month></u> | | |
| Quarterly campaign launch (if necessary) | | Client |

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| | | |
|--|-----|------------|
| Quarterly review of first quarter | | ODS/Client |
| <u><Month></u> | | |
| Quarterly campaign launch (if necessary) | | Client |
| Quarterly review of second quarter | | ODS/Client |
| <u><Month></u> | | |
| Begin building of next years incentive program | | ODS/Client |
| <u><Month></u> | | |
| Open enrollment | TBD | Client |
| Quarterly review of third quarter | | ODS/Client |

Appendix B: Data exchange and reporting

Rewards redemption file: A weekly file will be sent to the client wellness team with the status of the participants in regards to their rewards. The file will be sent in a .csv format each <frequency>.

Quarterly program summary: A quarterly program status report with aggregate participant data that shows how client's population compares to the rest of the book of business.